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ABSTRACT

The Office of Continuing Education at Edison State Community College developed a community pre-retirement training curriculum, which was designed to make a flexible, practical, locally adaptable program available for use by corporations, chamber of commerce education committees, adult education programs, and public institutions. The objectives of the project were to respond to the need for such a program as identified in a community needs assessment; to review more than 30 similar pre-retirement programs; to develop program modules that could be adapted to local needs and resources; and to provide a group of topics that could be used collectively or individually by various users. The achievement of these objectives involved the creation of an advisory committee, instructor training, coordination with local firms and agencies, and the development of a loose-leaf curriculum package for students. The resulting curriculum consisted of seven modules, covering the topics of Living in Retirement, Relationships, Using Your Time, Financial Preparations, Legal Affairs, Home and Health, and The Future Years. Institutions planning similar programs should take care in grouping corporate and business participants, include spouses in training sessions, offer separate sessions for single participants, and consider a variety of presentation styles and delivery formats. The bulk of the report consists of appendices including among other related materials a curriculum outline and program evaluation forms. (HB)

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COMMUNITY PRE-RETIREMENT TRAINING PROGRAM: FINAL REPORT AND STATISTICAL SUMMARY

By: Gary W. Wilson and George Oerke

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Office of Continuing Education
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Piqua, Ohio 45356

JC 820 260

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FINAL REPORT AND STATISTICAL SUMMARY

Project Title:

Community Pre-Retirement Training Program

Abstract:

The Office of Continuing Education, Edison State Community College, developed a community pre-retirement training curriculum which was designed to make possible a flexible, practical, locally-adaptable program available for use by corporations, chamber of commerce education committees, adult education programs and public institutions. The overall objectives were: 1) to respond to community needs assessment survey which indicated pre-retirement training as a need; 2) to review the more than thirty pre-retirement training programs in print when the project began; 3) to revise, adapt, and create curricula necessary to develop a flexible program which could be modularized and made responsive to local needs and resources; 4) to provide a comprehensive group of topics which could be used collectively or individually by various users. The methods used to develop the curriculum involved the utilization of a comprehensive lay advisory committee, the observation and/or collection of previously developed curriculum packages, the revision of various curricula to conform with local writing efforts, the field testing of the draft curriculum through two industrial personnel offices, and the subsequent packaging of the final curriculum in a loose-leaf format for flexibility and future revision. The delivery of the curriculum package has been and will be used in industrial in-service settings, small business aggregate settings through chamber of commerce education committee programming, college adult education offerings, and public institution in-service training opportunities.

Purpose and Accomplishments:

The development of a self-contained and continuous pre-retirement training program for individuals in Darke, Miami, and Shelby counties was accomplished as stated in the proposal. The original proposal was designed to use volunteer participants during the trial curricula period of the project but this activity was revised by using retiring employees from two area corporations. The mutually agreed upon training was effected by the voluntary enrollment of individuals at the Copeland Corporations plant in Sidney, Ohio, and at the Hobart Corporation plant in Troy, Ohio. (See Attachments 1 and 2 at the end of the report.)

As proposed in the grant application a modular curricula framework was utilized. Experts in appropriate fields of retirement curricula were employed to draft the individual modules. (See Attachment 3) The modules underwent several revisions from the basic format of subcategories. (See Attachment 4) Nineteen instructors were trained in the various curricula topics to refine their professional knowledge and teaching methodology. (See Attachment 5) The cadre of instructors were prepared so that they could present the specific module content which was consistent with their own professional backgrounds. The assumption that knowledge alone does not prepare an individual to become a skilled teacher prompted the training of all cadre in educational technique sessions conducted by a member of the Edison State faculty. The original

proposal outlined the use of five trainers per module. However, the actual number of trainers available in the various curricula module areas ranged from two to four. The reason for fewer trainers being trained was the result of two local decisions. One being the desire to use only thoroughly qualified cadre, and the other being the delay in beginning a final training session due to the unavailability of potential trainers for training by the last day of the grant period. However, the training will be conducted at local expense following the grant period.

A permanent advisory committee was established consisting of members of the original advisory committee trainers, the project coordinator, and the Director of Continuing Education (See Attachment 6)

Grant support for the projected budget was negotiated from $15,520 to $13,000 for the Title I share of costs, but it did not severely impede the success of the project. A one-half time coordinator, George W. Oerke, was employed to implement and manage the project and was assisted by a one quarter-time secretary, Brenda Puterbaugh Wilson. Faculty and professional staff of Edison State were employed on small stipends to assist in the curricula development and in some cases to provide the training of cadre. Two one-half day training sessions were conducted on teaching methodology. This was a reduction in the planned training time. Because of the degree of expertise and experience shown by the trainers the additional time was not seen as necessary.

The College provided office space for the coordinator, classroom space for training and development, audio-visual equipment, and supportive materials on an in-kind contribution basis. Also, time was donated by members of the professional staff in some cases to assist in the accomplishments of the project.

The original proposal indicated that no consistent pre-retirement training program was being used in the Edison State service area. This fact was born out by community relations contacts made by the project coordinator during the project year. The requests for Edison State to conduct pre-retirement training during 1981-1982 include preliminary requests from Copeland Corporation, Sidney plant (two requests); Hobart Corporation, World Headquarters, Troy, plant (two requests); Monarch Machine Corporation, Sidney plant (one request); Container Corporation, Piqua plant (one request); Stolle Corporation, Sidney plant (one request); Hobart Brothers Company, Troy plant (one request); Office of Continuing Education seminar series the request from the Flesh Public Library, Piqua, Ohio; and Hartzell Industries, Piqua plant, (one request).

The specific objectives of the project were accomplished as indicated below:

1) To assess local priorities concerning pre-retirement planning through the establishment of an advisory council representing education, government, social services, and business and industry.

   Results: See Attachments 6 and 7

2) To develop a pre-retirement educational package with a flexible modular format that would be available to industry, business, service and general public groups.

   Results: See Attachment 8

3) To develop a cadre of instructors who could assist in the marketing of the training package, and provide instruction according to demand, during an indefinite period of time.

   Results: See Attachment 5

4) To establish an on-going professional advisory committee originally consisting of the trainers from each selected topic field, and the Director of Continuing Education at Edison State Community College.

   Results: See Attachment 6

5) To develop a model program format that could be used by other communities.

   Results: See Attachment 12

A project action calendar was used to keep the activities on schedule so that the objectives could be reached during the one-year allocated time period. The action calendar was revised to reflect the two month delay in funding and coordinator employment. However, the revised action calendar was adhered to and all tasks were completed during the June, 1980, to June, 1981, twelve-month period. (See Attachment 9)

Summary and Recommendations

The project work resulted in a collection of curricula being developed which had the following training objectives.

1. the stimulation of the participants to plan for retirement.
2. the development of favorable attitudes toward retirement.
3. the helping of participants to develop realistic expectations about retirement.
4. the introduction of information directed at making specific decisions during the transition from employment to retirement
5. the positive development of employees and/or retiree attitudes toward the retirement benefits of public and company benefits.
6. the providing of information sources for the multitude of questions concerning retirment assistance.
7. the development of high morale and low anxiety feelings by participants which may be enhanced through personal planning efforts.

The curricula package incorporated a loose-leaf style for flexibility in updating materials or incorporating locally appropriate materials to the core materials; bibliographies after each module with a more general one at the end of the package for the increased opportunity to participants and instructors; worksheets to personalize the material for each participant while involving him/her in the discussions more deeply; loose-leaf binders and title pages which may be labeled with the appropriate employer's name or office responsible for the training by the use of decals or replaced pages; illustrated pages and optimal readability for persons with varied academic backgrounds; a table of contents without an index page to allow flexible addition or deletion of pages; an optional module on the topic of housing designed for persons with low reading ability.

The development of the package was the result of locally creative writing in some instances and the use of selected materials from thirty-one curricula packages studied during the project year. Copyright privileges were obtained for all materials contained in Attachment 8. Copyright privileges are pending on several additional resource packages at the time of this writing.

The advisory committee in conjunction with the coordinator reviewed all materials available. The committee then selected eight module topics after prioritizing topics listed in a document prepared by the Retirement Studies Division at the University of Chicago which listed nineteen areas of planning. (Attachment 10) The topics selected for development were Living In Retirement, Relationships, Using Your Time, Financial Preparations, Legal Concerns, Your Home and Health, Your Future Years and Transportation. Transportation was later included in other topics rather than in a separate module. In another area of Ohio this topic may have great interest--and, possibly, should be included.

Content experts were selected by the coordinator due to their professional backgrounds and writing abilities. It was acknowledge in the proposal that teaching methods would be taught to the potential trainers as professional backgrounds alone would not necessarily insure acceptable teaching standards.

The coordinator reviewed and modified each training module during the initial writing process and again after each trial presentation. Input was received after each module through participant evaluations (Attachment 11) and through review sessions with the trainers and coordinator. Following the second trial program a final package was prepared.

In addressing the flexibility of the pre-retirment curricula programming several recommendations were made by the project staff which may assist other institutions in planning similar programs. These recommendations are:

1. Care should be taken in grouping corporate or large business participants. (Hourly, salaried, management, executive, etc.) The reason for this concern resulted from the realization that the varied background and educational experiences of the participants cause a standardized enrollment approach to be inappropriate.

2. The inclusion of married spouses in the training sessions is vital because retirement planning is a family effort and relationships are involved as the module Relationships indicates.

3. The development of various presentation styles should be considered prior to beginning the training. The needs of the participants to be served should be considered rather than the professional ego of the writer or presenter. (i.e. reading level of materials, participant involvement activities)

4. Locally appropriate selection of content examples should be attempted to prevent the "canned" appearance. Trainers should also be local experts whenever possible.

5. The preparation of a detailed longitudinal retirement plan should be stressed to all persons involved in the training. Beginning at least ten years prior to actual retirement is considered necessary by retirement planners.

6. Single or unmarried participant sessions should be offered due to the fact that the interests of single persons are not consistent with those of married persons.

7. A variety of delivery formats should be considered to provide a comprehensive training effort. This is especially important for educational efforts for industrial firms. Adequate lead time is needed for individuals and families to plan for retirement. Overview workshops could be conducted early in a career with periodic printed materials being distributed. The actual seminar series addressed in this report should be conducted shortly after the participant reaches age 50. Post-retirement efforts could be provided which would include company publications, retirement publications, social group activities, individual counseling, and return visits to the work place.

The staff of the Office of Continuing Education will remain available for assistance to persons with other institutions of higher education in Ohio who wish to implement similar programs.

The rewards for having participated in the Title I project grant have been not only the development of the curriculum for each module, but the association with the professional staff members who have become trainers, as well as Marlene Rushay with the Ohio Board of Regents office who assisted in implementing the project.

Attachment 1

EDISON STATE COMMUNITY COLLEGE • 1973 Edison Drive
Piqua, Ohio 45356 513-778-8600

CONTRACT

Copeland Corporation (Name of Organization) agrees to contract with Edison State Community College for the purpose of establishing a training program entitled "Retirement Planning Program" (Name of Course). This course will begin February 24, 1981 (Date) and end April 7, 1981 (Date), and will be held from 7 p.m. (Time) 9 p.m. (Time) on Tuesdays (Day). Copeland Corporation (Name of Organization) agrees to pay Edison State at the rate of $1.64 (rate) per hour of instruction per student, plus 19¢ (rate) per mile transportation expenses for the instructor from Edison State Community College (ESCC or Pt. of Departure) to Copeland Corporation (Site of Class) or 14 (miles) miles.

It is understood that the minimum number of students for the course will be ten. A class that is smaller in number than 10 individuals will be billed for 10 and Copeland Corporation (Name of Organization) agrees to pay for additional students at the stated rate. Edison State will bill Copeland Corporation (Name of Organization) within one month following completion of the course.

Signature	Signature
Manager, Training & Development (Position)	Coordinator, Pre-Retirement Training (Position)
February 6, 1981 (Date)	February 4, 1981 (Date)

EDISON STATE COMMUNITY COLLEGE • 1973 Edison Drive
Piqua, Ohio 45356 **513-778-8600**

CONTRACT

Hobart Corporation (Name of Organization) agrees to contract with Edison State Community College for the purpose of establishing a training program entitled

Pre-Retirement Program (Name of Course). This course will begin October 14, 1981 (Date) and end November 3, 1981 (Date), and will be held from 8:30 a.m. - 10:30 a.m. (Time) on Tuesday & Thursday (Day). Hobart Corporation (Name of Organization) agrees to pay Edison State at the rate of * per hour of instruction per student ($3.50 single; $6 couple) SEE ATTACHMENT, plus $50.00 per mile transportation expenses for the instructor from Edison State Community College (ESCC or Pt. of Departure) to Troy plant (Site of Class) or - - miles.

It is understood that the minimum number of students for the course will be ten. A class that is smaller in number than 10 individuals will be billed for 10 and Hobart Corporation (Name of Organization) agrees to pay for additional students at the stated rate. Edison State will bill Hobart Corporation (Name of Organization) within one month following completion of the course.

Signature	George Oerkel (Signature)
Position	Coordinator (Position)
Date	10/25/81 (Date)

EDISON STATE COMMUNITY COLLEGE
Pre-Retirement Program

Professional Writers	Module Titles
Tom Bomhard, Administrator Pine Croft Retirement Village 3130 North Dixie Highway Troy, OH 45373	Your Home
Judy E. Carroll, Coordinator Nursing Home Area Training Center Edison State Community College 1973 Edison Drive Piqua, Ohio 45373	Your Health
Mr. Theodore O. Finnarn Attorney 127 West Fifth Street Greenville, Ohio 45331	Legal Concerns
Mr. Joe Norris Stock Broker Edward D. Jones and Co. 317 North Wayne Street Piqua, Ohio 45356	Financial Preparation
Mrs. Maria B. Overholt Director Miami Valley Library Organization 212 Harrison Street Piqua, OH 45356	Use of Time
Ms. Arnedia M. Smith Instructor of Sociology Edison State Community College 1973 Edison Drive Piqua, Ohio 45356	Relationships
Educational Methodology Trainer	
Ms. Marilyn J. Faulconer Instructor in Speech and English Edison State Community College 1973 Edison Drive Piqua, OH 45356	Training

Outline of Retirement Planning Program

Planning a retirement life is deeply personal. This course is to present the options from which realistic decisions can be made.

This course is organized under five areas of concern to those approaching retirement: Facing Retirement, Personal Changes, Money Matters, Home and Health and What's ahead.

Part A Facing Retirement

Session 1 - Living in Retirement: An overview of the retirement planning options offered by the course. The slide presentation with script: "The Retirement Enrichment Program" produced in part, by Retirement Advisors.

Part B Personal Changes

Session 2 - Relationship - Family and Friends: Changes in life adjustments with spouse and family, concerning interpersonal relations, loneliness, frustration, tension, sexuality, death and healthy mental attitude toward retirement and aging.

Session 3 - Using Your Time: Keeping active and involved, hobbies, travel, recreation, finding new friends, Volunteer Work, reading, part-time employment, or possible second careers, educational opportunities, and community services.

Part C Money Matters

Session 4 - Financial Preparations: Your retirement income and expenses, inflation and investment, the Hobart Corporation retirement plan, social security, insurance, budgeting, record keeping, consideration annuities, mortgages and tax exemptions.

Session 5 - Legal Affairs: Planning of your estate, making a will, estate and gift taxes, trust funds, frauds and consumer awareness, personal documents, joint ownership, liability.

Part D Home and Health

Session 6 - Your Home and Your Health: New priorities in retirement, condominiums, cooperative apartments, mobile homes and trailers. Retirement Communities, Life-Care facilities. Where to live, buy or rent, transportation costs, safety features and preventing accidents, Hobart Corporation health benefits, Medicare, psychological health, nutrition, exercising, diet and physical activity, warning symptoms.

Part E What's Ahead

Session 7 - Your Future Years: The transition from work to retirement, decisions made will profoundly effect the surviving partner, remarriage of survivor, picking an executor, get it all settled now, make your wishes known, records for the survivor, asking yourself the hard questions, funeral arrangements, challenges can be turned into opportunities.

TRAINERS

COPELAND CORPORATION

Cecil T. Hartley 404 Hilltop Court Troy, OH 45373	Counselor for Retirement and Aging Retired as Manager of Personnel Services, Chrysler Corporation, Dayton "Outstanding Senior Citizen" award, presented by the Ohio Council on Aging in 1976.
Maria B. Overholt 212 Harrison Street Piqua, OH 45356	Director, Miami Valley Library Organization; Administrator, Whitewater Valley Area Library Service; Assistant Principal, Teacher in the elementary schools
David L. Russell 2104 North Broadway St. Sidney, OH 45365	Certified Public Accountant; Graduate of Miami University in Accounting; Specialist in business promotions.
Theodore O. Finnarn 127 West Fifth Street Greenville, OH 45331	Attorney; educated at Miami University and University of Toledo. Publications: Property Taxes and Farmers in Ohio and Symposium: Agricultural Law and Policy; serves on the Ohio Committee on Agriculture
Frank Neville 217 East Court Street Sidney, OH 45365	Director, Metropolitan Housing Authority; band director
Joan Woodrum Route #3 Bellefontaine, OH 43311	Registered Nurse, staff nurse at Sunny Acres Care Center and prior, Grady Memorial Hospital, Oak Hill Hospital, Jenkins Memorial Hospital.
Ann K. Wagner 103 Freedom Court Sidney, OH 45365	Elementary teacher, staff nurse, visiting nurse; Master in Education, Xavior University

HOBART CORPORATION:

James Faulconer 199 South Dorset St. Troy, OH 45373	Director, Shelby County Mental Health Association, Clinic Clergyman, Counselor, Master of Divinity
Gale Thornton 125 West Dakota Street Troy, OH 45373	Counselor and Clergyman Developer of a Golden Years Program
Charles Gorrell 910 West Main Street Troy, OH 45373	Chairman of the Board, First National Bank and Trust Company; leader in the banking industry; active citizen of the community; president, West Central Ohio, Bank Administration Institute.

Joseph C. Caserta 1818 Carol Drive Piqua, OH 45356	Special Agent, The Prudential Insurance Company of America; Speaker and training instructor; member of Prudential's Hall of Honor
Jeffrey M. Welbaum 314 West Main Street Troy, OH 45373	Attorney, Miller, Schlemmer and Luring; Assistant Prosecuting Attorney; Associate faculty, Edison State Community College
Robert Schlemmer 314 West Main Street Troy, OH 45373	Attorney, Miller, Schlemmer and Luring; Active in civic and professional organizations.
Harry G. Roediger 311 South Market Street Troy, OH 45373	Broker, Appraisals of Real Estate; past president, Miami County Board of Realtors
Korrene Adams Troy, Ohio 45373	Registered Nurse, General Supervisor, Stouder Hospital; graduate of Sioux Valley Hospital, South Dakota
George Oerke 234 Harvard Avenue Sidney, OH 45365	Administrator, Sunny Acres Care Center Clergyman, Associate Faculty, Edison State Community College; Master of Arts in Education with emphasis in Gerontology.

Trained, But Not Used

Kenneth Moore 4025 North Piqua-Troy Rd. Piqua, OH 45356	Director, Piqua National Bank, civic leader; trust officer
Douglas Brookhart 1100 N. Broadway Avenue Sidney, OH 45365	Manager, Sidney Municipal Utilities, varied group of hobbies and activities, editor, trade publication, member of many organizations.
Catherine A. Heiser 326 Marion Drive Greenville, OH 45331	Staff nurse, Greenville Hospital, Group Worker, Social Service staff liaison between city government and retired persons.

EDISON STATE COMMUNITY COLLEGE

Community Pre-Retirement Training Program
Advisory Committee

Mr. George Brockman
Certified Public Accountant
OHIO BUILDING
Sidney, OH 45365
492-6101

Ms. Opal Couchot
Executive Director
YWCA
418 North Wayne Street
Piqua, OH 45356

Mr. Theodore Finnarn, Attorney
127 West Fifth Street
Greenville, OH 45331
548-8995

Mr. Gene Gretch, Director
Social Security Office
219 West Ash Street
Piqua, OH 45356
773-8097

Mr. Arthur Haddad, Director
Service and Safety
City of Troy
City Hall
Troy, OH 45373
335-4281

Mr. Elton Meiring, Personnel Manager
Midmark Corporation
(Versailles and Minster)
115 North Ohio Street
Minster, OH 45865
(419) 628-2311

Mr. Sal Miceli, Director of Personnel
Western Division, United Telephone
Company of Ohio
Sidney, OH 45365
498-5174

Mr. Gary Miller, Personnel Department
Stolle Corporation
1501 West Michigan Street
Sidney, OH 45365
492-1111

Mr. George Oerke, Chairman
Pre-Retirement Training Program
Advisory Committee
234 Harvard Avenue
Sidney, OH 45365
492-2905
Mr. Oerke is also available at ESCC,
778-8600, Extension 215.

Mr. Douglas Russell, Personnel Department
Hartzell Industries, Inc.
1025 Roosevelt Avenue
Piqua, OH 45356
773-7411

Mr. James Severs, Manager
Staffing and Development
Hobart Corporation
World Headquarters
Troy, OH 45374
335-7171

Mr. Lisle Smith, Executive Director
Miami County YMCA
223 West High Street
Piqua, OH 45356
773-4305

Mr. Gary Wilson, Director of
Continuing Education
Edison State Community College
1973 Edison Drive
Piqua, OH 45356

EDISON STATE COMMUNITY COLLEGE

Pre-Retirement Program Advisory Committee
October 23, 1980
Board Room

Minutes

Opening Comments by George Oerke, Program Coordinator

Retirement planning programs are on the upswing and now more that 1/3 of the employees in the United States have a program. About 1/3 of the companies having a program have them available for employees at 55 years of age.

In a Wharton School, Department of Management, research study of 318 employees the reason given for a pre-retirement program being offered was that the company had a responsibility to help its long-term employees make the transition into retirement. Other reasons mentioned were to improve employee morale, the company image, and to encourage early retirement. A discussion followed about the proper age group for retirement planning programs.

A slide-cassette from Eugene, Oregon on Introduction or Orientation session was shown. Response: It had good information; however, it was oversimplified and did not spark excitement in the retiree to do planning in beginning session. A discussion followed concerning the responsibility and pay of a program trainer. At this time, trainers have been found for the following modules: housing-2; health-3; leisure-3; relationships-2; estate planning-1. Suggestions of names for possible trainers were made by committee members.

Visual tapes were played, "New Wrinkles in Retirement" and "Ready or Not". Response: If made by ESCC a visual needs to to be shown to persons and places in our local geographical area.

Response of program materials: The committee liked the flexability of a three-ring loose leaf binding notebook the best. However, they thought it was overwhelming to give out all materials at one time. A suggestion was made to pass out each module a week prior to use. It was suggested that a group of Retirement magazines be shown and a list of the name, address, and cost of the magazines be passed out to class participants.

Printed Materials: These materials should be printed in large type. Charts should be positioned within the text. Be sure to have a lot of white space, do not fill up pages with text materials. Use black ink upon white paper because it is easier to read. The Retirement Living pamphlets were preferred by one member.

Visual Aids: Visuals do hold persons attention! A suggestion was made to use real persons and not cartoons on film.

In a slide presentation, it was preferred to use a person reading a script to using a recorded cassette. A visual needs to be prepared so it can be

stopped from time to time to allow brief discussion of the material.

The committee members also suggested that adequate discussion time be planned so that class members would have an opportunity to participate.

It was suggested that older trainers might be better received than younger ones.

Minutes
Advisory Committee Meeting
Community Pre-Retirement Training Program
August 21, 1980
7:30 - 9:00 p.m., Room A105

Preparations:	Prepare lists of committee members and table tents with name and organization. Make 13 overhead transparencies, place information on chalk board, place materials on tables, set up film strip projector, overhead projector, prepare handout on personal rating of important retirement topics.
Members Present:	George Oerke, Chairman, George Brockman, Theodore Finnarn, Arthur Haddad, Elton Meiring, Sal Miceli, Gary Miller, Douglas Russell, Richard Smith, Lisle Smith, and Social Security Representative Paul Schwambach.
7:30	Entrance of persons, meet and brief introduction, pick up committee list, mix with other members and look at three tables of displayed pre-retirement materials. Welcome to Advisory Committee, Edison State Community College.
7:35	Introduction of members. Each person giving name, organization, place of birth, where now live, examples of personal experiences with retirement and programs.
7:45	Present background of program Title I grant for fiscal year 1980 from Higher Education Act of 1965. (overheads) 1. Title I Lifelong Learning Project. 2. Survey questions and results.
7:50	Use of film strip and cassette on "The Challenges of Aging", #457 "Change and Loss" Change in Work Environment by Trainer, followed by discussion.
8:10	Presentation of modules or areas of interest in retirement. (Eight overheads) Briefly discussed different materials and topics now available.
8:20	Break -- look at printed materials on the three tables.
8:30	Use of three page (8½ x 14) prepared with eight different topics or modules now in print by groups.
8:35	Distribute handout on personal rating of area of importance. (overhead) Retirement Planning Profile with the 19 areas that appear in graft form which appear on the handout.
8:45	Share results as to assessment of priorities in curriculum development.

The following module topics were developed by the advisory committee.

Perhaps an introduction or orientation session.
1. Financial affairs
2. Housing (location)
3. Health (medical and physical)
4. Estate planning (legal)
5. Leisure activities (life styles)
6. Relationships (psycho-social)
7. Transportation
8. Benefits of the company or organization.

It was later suggested that transportation would naturally fall under the topic of housing.

8:50 The identification of trainers for each potential module was considered. The requirements were presented for trainers. The advisory committee requested that they be given time to pick out possible persons and names for consideration at a later date.

8:55 The next meeting of the committee was set for Thursday evening, October 23, 1980.

9:00 Adjournment

Attachment 8

Edison State Community College

Pre-Retirement Planning Advisory Committee

October 23, 1980

Cider and Donuts

WELCOME: President James Seitz

AN INTRODUCTORY OR ORIENTATION SESSION
(a slide/audio presentation)
by RETIREMENT SERVICES INC., Eugene Oregon

How would you rate these materials as a way of presenting the subject of Pre-Retirement?

POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
1 - 2	3 - 4	5 - 6	7 - 8	9 - 10

COMMENTS: Gary Wilson, Assistant Dean of Continuing Education

WHAT'S AVAILABLE IN PUBLISHED PRE-RETIREMENT PROGRAMS

Over 30 universities, research, personnel, labor, counseling and association groups have compiled various types of materials.

How would you rate the types of Program Formats?

	INSUFFICIENT	ADEQUATE	EXCELLENT
Looseleaf Binders			
LIFETIME LEARNING PUBLICATIONS	1 - 2	3 - 4	5 - 6
NATIONAL ASSOCIATION OF MATURE PEOPLE	1 - 2	3 - 4	5 - 6
ACTION FOR INDEPENDENT MATURITY	1 - 2	3 - 4	5 - 6
Expanding File			
RETIREMENT ADVISORS INC.	1 -2	3 - 4	5 - 6
Bound Work book			
READY OR NOT	1 - 2	3 - 4	5 - 6
MISSOURI COOP. EXTENSION	1 - 2	3 - 4	5 - 6
Spiral Workbook			
RETIREMENT SERVICES INCORPORATED	1 - 2	3 - 4	5 - 6
Spouse Psycho - relationship & books			
NHO CONSULTANTS, INC.	1 - 2	3 - 4	5 - 6

	INSUFFICIENT	ADEQUATE	EXCELLENT
VIDEO TAPE PROGRAMS			
MAINTAINING HAPPINESS	1 - 2	3 - 4	5 - 6
NEW WRINKLES			
LEGAL MATTERS - READY OR NOT	1 - 2	3 - 4	5 - 6

MORE CIDER AND DONUTS!

VOLUNTEERS whom I would recommend to be in the trial class sessions:

_____ _____

_____ _____

PROGRAM TRAINERS will receive training in educational methods, and will receive about $ 30 for each module along with travel allowance.

PROGRAM

Trainers are needed to present the various modules. Do you know of a qualified professional in financial affairs, estate planning, legal matters, relationships (psycho-social), leisure activities or housing options.

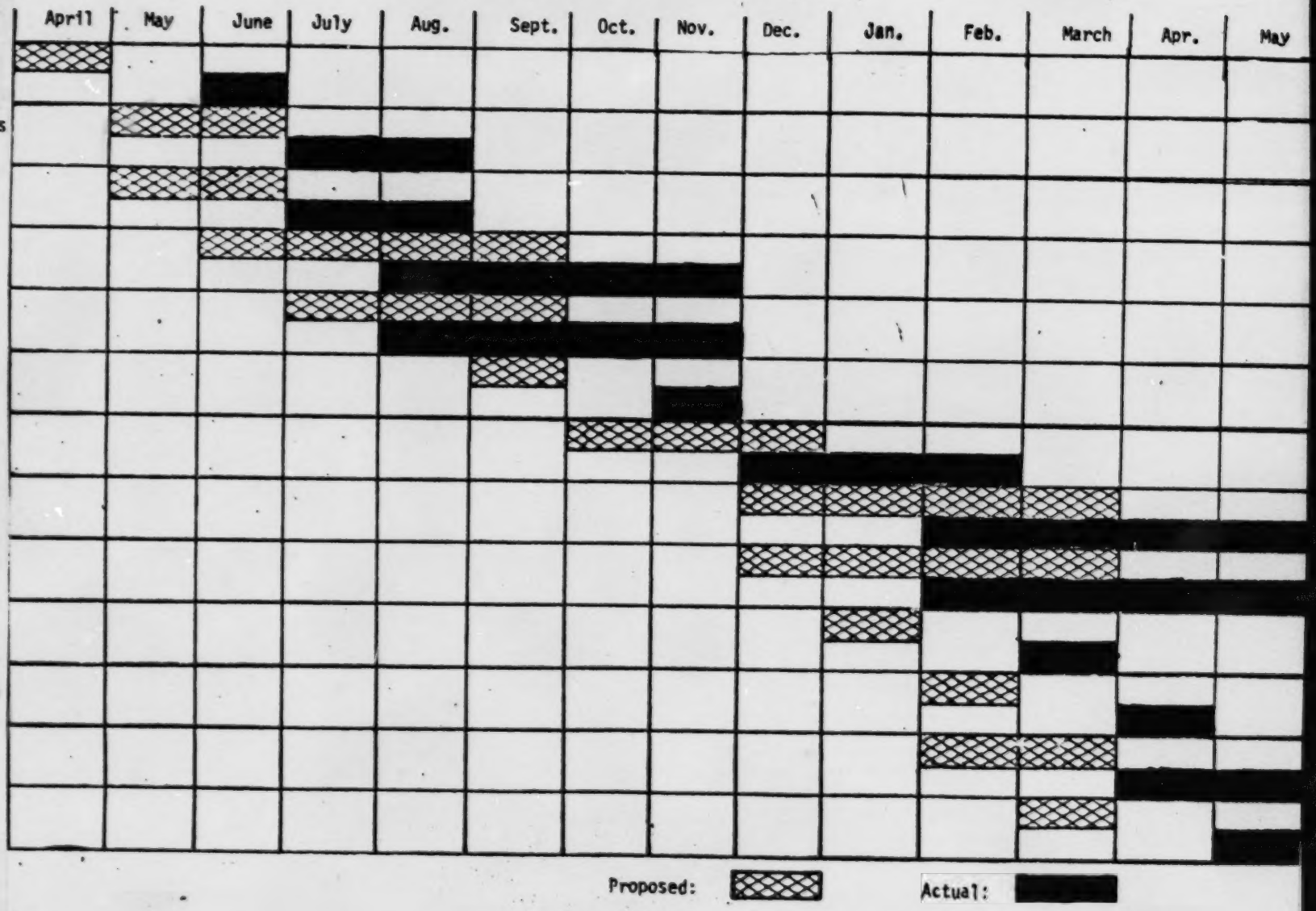
QUESTIONS AND ANSWERS

MEMBERS OF THE ADVISORY COMMITTEE

George Brockman, CPA, Sidney, OH
Opal Couchot, YWCA, Piqua, OH
Theordore Finnarm, Attorney, Greenvill, OH
Gene Gretch, Social Security, Piqua, OH
Arthur Haddad, City of Troy, Troy, OH
Elton Meiring, Midmark, Versailles, OH
Sal Miceli, United Telephone, Sidney, OH
Gary Miller, Stolle, Sidney, OH
Douglas Russell, Hartzell, Piqua, OH
James Severs, Hobart, Troy, OH
Lisle Smith, YMCA, Piqua, OH

Attachment 9

TIME SCHEDULE



Attachment 10

Brief Descriptions
of
NINETEEN AREAS OF PLANNING FOR RETIREMENT

1. COMMUNITY INVOLVEMENT
   Understand my obligations and my role as a retiree in the community
2. CRIME AND ISOLATION
   Develop my resources to provide physical and emotional security during retirement
3. FAMILY RELATIONS
   Adapt family relationships to my role as a retiree
4. FINANCIAL MANAGEMENT
   Develop skill in managing financial resources for myself(and my spouse) in retirement
5. GAINFUL EMPLOYMENT
   Determine my need and my opportunities for a job in retirement
6. HOBBIES
   Renew or develop my interests in hobbies
7. LIVING AREA
   Select a location for myself (and my spouse) to live in retirement
8. LIVING ARRANGEMENT
   Determine my physical and social needs in retirement residence
9. MENTAL HEALTH
   Build realistic attitudes toward aging and my role as a retiree
10. NUTRITION
    Develop sound eating habits to maintain my health and vigor in retirement
11. PERSONAL SAFETY
    Develop my awareness of good personal safety practices as I age
12. PHYSICAL HEALTH
    Maintain my physical health in retirement
13. SELF–DEVELOPMENT
    Establish a program for my self-improvement during retirement
14. SOCIAL RELATIONS
    Understand the social patterns of my life now and after retirement
15. SPIRITUAL WELL–BEING
    Examine the role of religion in my life now and in retirement
16. TRANSPORTATION
    Determine how I am going to get from place to place as I age
17. TRAVEL
    Decide on my interest in and opportunities for travel in retirement
18. USE OF TIME
    Schedule routine and special activities in order to use my time effectively
19. VOLUNTEER ACTIVITIES
    Assess my interest in volunteer service as one of my retirement activities

Retirement Studies Division
Industrial Relations Center / The University of Chicago
1225 East 60th Street
Chicago, Illinois 60637

RP–541-A-1
10–5–1000

Attachment 11

Evalution Form

Copeland Corporation - Retirement Planning Program
February 24 (through) April 7, 1981

1. My age is: (circle one letter)

   a. less than 50 years
   b. 51 - 60 years
   c. more than 60 years

2. The topic area covered today: (circle one letter)

   a. Overview, Benefits
   b. Relationships
   c. Using Your Time
   d. Financial Preparation
   e. Legal Affairs
   f. Your Home and Your Health
   g. Your Future Years

3. I would rate the quality of instruction as: (check for each person)

	Leader 1	Leader 2
a. Excellent	_____	_____
b. Good	_____	_____
c. Fair	_____	_____
d. Inadequate	_____	_____
e. Poor	_____	_____

4. I would rate the workbook materials for this topic as:

   a. Excellent . . . . . _____
   b. Good . . . . . _____
   c. Fair . . . . . _____
   d. Inadequate. . . _____
   e. Poor . . . . . _____

5. What did you like best about this session?

   What did you like least about this session?

Attachment 12

THE UNIVERSITY OF CHICAGO
CHICAGO · ILLINOIS 60637

HUMAN RESOURCES CENTER
for Research, Education, and Training
1225 EAST SIXTIETH STREET

30 June 1981

George Oerke
Edison State Community College
1973 Edison DR
Piqua, OH 45336

Dear Mr. Oerke:

The Human Resources Center grants you permission to reprint the exercise, The Retirement Planning Analyzer in limited quantities (estimated at about 100) for a period of one year—July 1, 1981 through June 30, 1982.

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By: Marvin D. Veronee
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Retirement Studies

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